

California Developmental Disabilities Information System -- CADDIS	DRAFT 1 <sup>st</sup> Updated – Submitted for DDS Review
Training Plan	Date: November 21, 2003

## 12 Appendix 3 – Sample Mapping to Target Audiences

This appendix is intended as a sample matrix to serve as a guide for Regional Centers to determine which users should attend the various training modules during CADDIS User training. Regional Centers can use this template and include the appropriate headings for their Regional Center. They can also use the template to identify the appropriate CADDIS User Training audiences based on the curriculum outlined in Appendix 1.

Sample of Modules per End-User Group															
#	Modules	Intake Staff	SC Staff	Case Manager	RD Staff	Transportation	QA Staff	Fiscal Staff	POS Staff	Operations Staff	Revenue Staff	General Mgmt	Clinical Services	Support Services	Other Services
1	101 Introduction to CADDIS														
	All modules	X	X	X	X	X	X	X	X	X	X	X			
2	201-A Consumer Case Development														
	Call Logging and Screening	X	X												
	Consumer Profiles		X	X											
	Insurance and Benefits		X	X											
	Eligibility and Referrals		X	X											
	Notice of Action and Consumer Appeals		X	X											
	Episodes and Service Periods		X	X											
	Diagnosis Entry		X	X											
	Service Planning and Reviews		X	X											
	Assessments		X	X											
	Provider Searches		X	X											
	Provider Authorizations		X	X											
	Consumer Trust Management		X	X											
	Service Entry and Notes		X	X											
	Legal Status and Conservator Tracking		X	X											
	Waiver Tracking		X	X											

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#	Modules	Intake Staff	SC Staff	Case Manager	RD Staff	Transportation	QA Staff	Fiscal Staff	POS Staff	Operations Staff	Revenue Staff	General Mgmt	Clinical Services	Support Services	Other Services
	Special Incident Reports		X	X											
	Medication Tracking		X	X											
	Review the Consumer Case Records Summary Screen		X	X											
	Case Transfers		X	X											
	Consumer Notes		X	X											
	Consumer Reports		X	X								X			
<b>3</b>	<b>201-B Quality Assurance</b>														
	Quality Assurance Monitoring						X								
	Quality Assurance Evaluations						X								
	Quality Assurance Technical Assistance						X								
	Quality Assurance Complaints and Rapid Response						X								
	Quality Assurance Immediate Danger						X								
	Corrective Plans						X								
	Sanctions						X								
	Recording Provider Notes						X								
	Viewing, updating, and attaching Special Incident Reports to Quality Assurance Events						X								
	Quality Assurance Reports						X					X			

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<b>4</b>	<b>201-C Resource Development</b>														
	Provider Organizations				X										
	Provider Locations				X										
	Provider Programs and Capacity Management				X		X	X	X						
	Provider Fiscal and Business Data				X		X								
	Provider Staff				X			X	X						
	Provider Searches		X		X										
	Provider Application Tracking				X										
	Provider Appeals				X		X								
	Provider Rates				X			X	X						
	Provider Contracts				X			X	X						
	Transportation Routes and Requests				X			X	X						
	Provider Notes				X			X	X						
	Resource Development Reports				X										
	Viewing Special Incident Reports				X							X			

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5	201-D Fiscal														
	General Ledger							X							
	Fixed Asset Management							X							
	Budget Management							X							
	Provider Authorizations							X	X						
	Provider Authorization Payment History							X	X						
	Provider Invoices								X						
	Accounts Payable Adjustments								X	X					
	Garnishments								X	X					
	Operations Invoicing									X					
	Accounts Payable								X	X					
	Accounts Receivable							X							
	Loan Management							X							
	Bank Reconciliation							X							
	State Claims							X							
	Consumer Trust Management							X			X				
	Federal and State Reporting							X	X	X	X				
	Fiscal Reports							X	X	X	X	X			
	Fiscal Audits							X							